



Using the Work Tray

1.006

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Lesson Details

	Learning Objectives:	To ensure that trainees have a general understanding of how to use the Work Tray as a foundation for later training modules.
	Duration:	75 minutes
	Pre-requisites:	1.005 Using the Data Grid
	Recommended:	None

Agenda



Introduction



Configuring the
Work Tray



Transfer/Cancel



Tiles



Q&A

Agenda



Introduction



Configuring the
Work Tray



Transfer/Cancel



Tiles



Q&A

Work Tray



The Work Tray is the application's central hub for document retrieval and workflow management.



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The Work Tray is the application's central hub for document retrieval and workflow management. This feature is used daily to retrieve documents for update, review, approval and workflow progression.

The Work Tray allows you to manage work items your user role gives you access to. It includes work items that:

- you have created yourself
- you are currently working on and have access to in the system
- have been submitted by another user and are available for you to action.

You can use the Work Try Filters panel, as described in the next slide, to control the columns and content of the Work Tray.

The **Refresh** button refreshes with the content of the grid with the latest data.

The **Actions** button allows you to:

- Open and Claim the selected Work Items(s) if they are available to be claimed
- View the selected Work Item(s) without Claiming them
- Export the selected rows to Excel.

Work Tray



By default, the Work Tray displays these fields:

- Work Item Name
- Work Item Code
- Workflow Step
- Workflow State
- Submission Path
- Last Changed



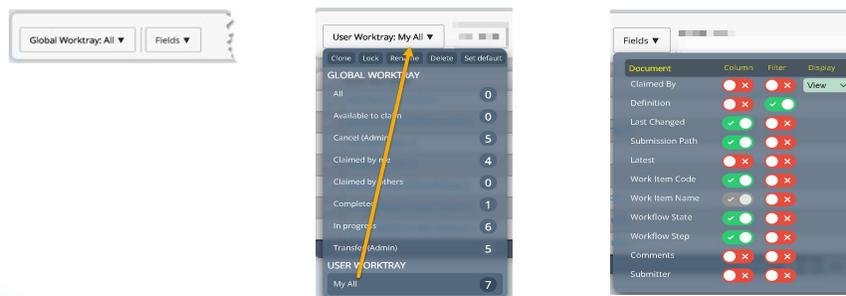
By default, the Work Tray displays these fields, or columns, however you can add other fields or, apart from Work Item Name, remove the default fields:

- Work Item Name
- Work Item Code
- Workflow Step
- Workflow State
- Submission Path
- Last Changed

Work Tray



The dropdowns control the content and columns of the Work Tray.



The Work Tray filters panel is where you can control the rows (content) and fields (columns) of the Work Tray. There are two controls on this panel when you first access it:

- 1. Rows** - The Query dropdown displays a list of GLOBAL WORKTRAY queries which are available to all users, and queries saved by the individual user under USER WORKTRAY. The caption displayed on the dropdown is the currently selected query.
- 2. Fields** - The Fields dropdown allows you to add/remove columns from the Work Tray grid, and to add/remove filters, from the set of available options. Columns and filters are added to the view in the order that you select them. Once you have selected columns or filters, your configuration is automatically saved under the Query dropdown, in the USER WORKTRAY area, with a default name.

Browser Support



Supported

- ✓ New Edge (Chromium-based)
- ✓ Chrome
- ✓ Firefox

Not Supported

- × Old Edge
- × Internet Explorer

Pop-up blockers

Please ensure pop-up blockers are disabled for the BIDS site in your browser. Refer to your browser documentation for information on allowing pop-ups.



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The application supports the latest versions of the most common web browsers; Microsoft Edge, Chrome, and Firefox.

Microsoft's Internet Explorer and the old version of Edge are not supported.

The application uses pop-ups, so please disable pop-blockers in your browser. Refer to your browser documentation for information on how to do that.

Agenda



Introduction



**Configuring the
Work Tray**



Transfer/Cancel



Tiles



Q&A

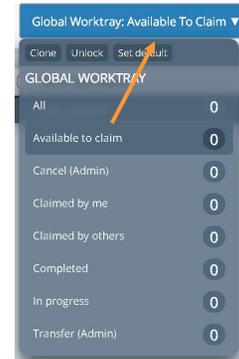
Global Work Tray Queries



Global Worktray queries are system defined and available to all users; except for:

- Cancel (Admin)
- Transfer (Admin)

which are only available to Administrators.



i The numbers shown next to the queries are the number of documents returned for the respective query.



Global Work Tray queries are system defined and available to all users.

- **All:** Displays all work items
- **Available to claim:** Displays Work items that are available for you to review or approve
- **Cancel (Admin):** Only available to users who have the Administrator role. Allows an Administrator user to cancel their claims or other users' claims
- **Claimed by me:** (Default selected Query) Displays Work items that you have accessed and currently have claimed
- **Claimed by others:** Displays Work items that you have access to that are claimed by other users. You will only have read access to these Work Items
- **Completed:** Displays Work items that you have access to and that have completed all workflow steps. You will only have read access to these Work Items
- **In progress:** Displays Work items that you have access to and that are still in progress
- **Transfer (Admin):** Only available to users who have the Administrator role. Allows an Administrator user to transfer their claimed documents as claimed to another user, or other users' documents

The text displayed on the button reflects the currently selected query.

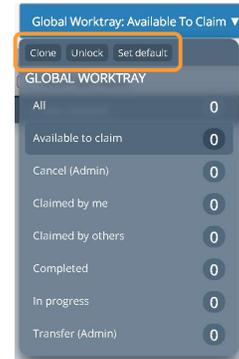
The numbers shown next to the queries are the number of documents returned for the respective query.

Query Dropdown Controls



The Query dropdown starts with three buttons.

Additional buttons added once User Worktray queries are saved.



The Query dropdown starts with three buttons:

- **Clone:** Allows you to clone and save Work Tray configurations for future use, which can be selected from the list later (click **Clone** after selecting the filters).
- **Unlock:** Allows you to modify queries in the User Worktray area (Click on **Unlock**, modify the filters then **Lock**)
 - **Lock:** Allows you to save/lock the user query after modification. (Once the user modifies the filter, click on **Lock** to lock the query)
- **Set default:** Allows a user to set either a GLOBAL or a USER WORKTRAY query as the default when the Work Tray is first selected, the current default is indicated by dark blue highlight on the right of the query name.

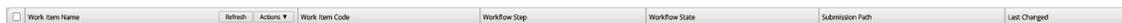
Additional buttons are added once User Worktray queries are saved; more on those later.

Work Tray



By default, the Work Tray displays these fields:

- Work Item Name
- Work Item Code
- Workflow Step
- Workflow State
- Submission Path
- Last Changed



By default, the Work Tray displays these fields, or columns, however you can add other fields or, apart from Work Item Name, remove the default fields:

- Work Item Name
- Work Item Code
- Workflow Step
- Workflow State
- Submission Path
- Last Changed

Configuring Work Tray Fields

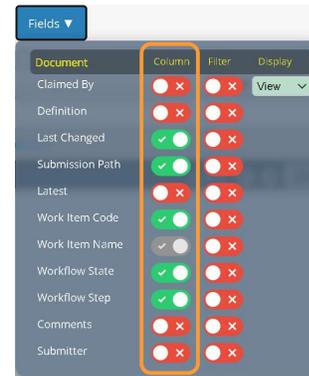


Use the Fields dropdown to add/remove Columns from the grid:

- Toggle a Column to display it on the grid or remove it



- Work Item Name is always selected.



i Columns are added in the order you select them, not the order in the dropdown.



The **Fields** dropdown allows you to add/remove Columns from the Work Tray grid.

- **Column:** Toggle the slider to add or remove the respective Document Field as a Column in the Work Tray Grid

The “Definition” slider surfaces the specific, individually searchable Fields relevant to the selected Document Type. Filter options will be presented to users based on selections from the "Definitions" list. Each definition has a unique set of Filters added to the Fields Filter menu once a 'Definition' filter value is selected (we'll look at this later when we discuss Filters).

Users can sort columns alphabetically or numerically by clicking on the column heading in either ascending or descending order. The default sort order is by last changed.

Columns are added to the grid in the order selected, not the order listed on the dropdown.

Document Fields



Field	Description
Claimed By	The user who has a current claim on the work item.
Definition	Document types; for example, Budget Allotment Schedule Appropriation/Allotment Modification
Last Changed	The date when the work item was last updated.
Submission Path	Shows the step in the Workflow that the document was submitted to; for example, a document at Department Draft was submitted to BudgetOffice Review.
Latest	?????
Work Item Code	The Document type suffixed with a unique ID. For example, a Budget Allotment Schedule: BAS.45
Work Item Name	The work item name; [WorkItemCode]-D[OrganizationCode]-F[FundCode]-[Year]-[DocumentName] For example; BAS.45-D0100-F100-2024-Full Allotment
Workflow State	Used for displaying the status of the work item. For example, Initial, Available, Claimed, Completed.
Workflow Step	The workflow steps; for example, Create, Budget Office Approval, Department Review, Delete.
Comments	Shows the comment entered on the Overview tab
Submitter	The user who submitted the work item



These fields are available for all document types:

Claimed By: For all Claimed Documents, the user who has the Claim. Empty if the Document is unclaimed.

Last Changed: The date when the work item was last updated.

Workflow State: Displays the status of the work item at the Workflow Step shown

Workflow Step: Used to search/display based on the available Workflow Steps. Shows the step that the work item is at.

Submission Path: The next step in the Workflow. For example, a Draft document will need to be sent to ????? in the submission path.

Definition:

Work Item Code:

Work Item Name: The work item name is derived from the following details:

- Document Type
- Document ID
- Document Code
- Agency
- Estimate Year
- Document Title

For example, a work item name for an Modification of Education department for Budget Year 2023 with title Test Load GEN can be:

?????-75 : [type] : [org] : [BYear] : Test Load GEN

Hands-on Lab Exercise 1



1. To add new, and delete columns on the Work Tray grid

Duration: 5 minutes



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WORK TRAY & COLLABORATION

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Objective

To add new, and delete columns on the Work Tray grid;

Duration: 5 minutes

Process

1. If you are not on the Work Tray, click the Work Tray tab
2. Click the **Fields** button and remove these columns from the grid by clicking the toggle under Column; the toggle will turn red; Workflow State, Workflow Step.
Note that the two columns have been removed from the grid.
3. Click the **Definition** toggle, it will turn green, and a Definition column will be added as the last column on the grid
4. Click the **Workflow Step** and **Workflow State** toggle, they will turn green, and two columns will be added as the last columns on the grid
Note that the two columns have been added in the selected order, not the order listed on the dropdown.

Work Tray Filters



Filters allow you to restrict the grid rows to those that meet your criteria:

- Toggle a Filter to display it on the grid or remove it



- A filter is added to the end of the Work Tray's Filters panel.



Document	Column	Filter	Display
Claimed By	○ ×	○ ×	View ▾
Definition	○ ×	○ ×	
Last Changed	●	○ ×	
Submission Path	●	○ ×	
Latest	○ ×	○ ×	
Work Item Code	●	○ ×	
Work Item Name	○ ×	○ ×	
Workflow State	●	○ ×	
Workflow Step	●	○ ×	
Comments	○ ×	○ ×	
Submitter	○ ×	○ ×	

i Filters are added in the order you select them, not the order in the dropdown.

The Fields dropdown also allows you to add/remove Filters from the set of available options. These filter field selections are added to the Work Tray in the order selected, not the order listed on the dropdown.

Document Filters



These filters are available for all document types

Field	Description
Claimed By	List of users who have a current claim on the documents. You can select @Me to save searching for your user. 
Last Changed	The date when the work item was last updated.
Workflow State	Used for displaying the status of the work item. For example, Initial, Available Completed
Workflow Step	The workflow steps; for example, Create, Approved, Budget Office Draft, Completed
Submission Path	The next step in the Workflow; for example, a document at Budget Office Review will usually be sent to Budget Office Approval in the submission path.
Definition	Document types; for example, Budget Allotment Schedule, Maintain Controls
Work Item Code	The Document type suffixed with a unique ID.
Work Item Name	The work item name; for example; BAS.16-DOrg0100-F100-2024-test



These filters are available for all document types:

Claimed By: For all Claimed Documents, the user who has the Claim. Empty if the Document is unclaimed.

Last Changed: The date when the work item was last updated.

Workflow State: Displays the status of the work item at the Workflow Step shown

Workflow Step: Used to search/display based on the available Workflow Steps

Submission Path: The next step in the Workflow. For example, a document at Budget Office Review will usually be sent to Budget Office Approval in the submission path.

Definition:

Work Item Code: Can be used to search for a specific Document, for example, “Has all of BAS.12”

Work Item Name: The work item name is derived from the following details:

- Document Type
- Document ID
- Agency
- Fund
- Estimate Year
- Document Name

[DocType].[DocId]-Dorg[OrgId]-F[FundId]-[Year]-[Name]

For example, a work item name for a Budget Allotment Schedule for Superior Court, General Fund (1) ,for Budget Year 2024, with the name Test BAS can be:

BAS.16-DOrg0100-F100-2024-Test BAS



Filter Controls

The Work Tray has three types of filter controls:

- Only values that you have read access to are available in filter dropdowns
- A search box will display if a filter has more than 10 options.

i Once you start keying/selecting the inputs for filters, the Work Tray automatically refreshes the documents on the grid accordingly.



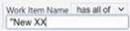
The Work Tray has three types of filter controls; Dropdowns (including Multi-select), Date pickers, and text boxes.

Only values that you have read access to are available in filter dropdowns. A search box will display if a dropdown has more than 10 options.

The Work Tray is dynamic in nature, once you start keying/selecting the inputs for filters, the Work Tray will automatically refresh the documents on the grid according to the inputs you enter

Filter Operators



Operator	Description
Has all of	Includes all of the words in the search expression. You can also search for a phrase by prefixing the phrase with a double-quote ("") 
Has any of	Includes any of the words in the search expression. You can also search for a phrase by prefixing the phrase with a double-quote ("")
Is	Matches the exact search expression
Is empty	The row does not have a value in the field
Not empty	The row does have a value in the field
In	Include all the selected items
Not in	Include everything except the selected items
Between	Between a start and end date that you specify
Within	Within a generic time period selected from a list, such as last month or last year



The filters have several operators available to help you select the rows that are important to you. Some are shared by both dropdowns and text boxes; some are only applicable to the Dropdown or Date picker control.

Viewing and Claiming Work Items: Actions



Click the checkbox next to one or more Work Items, select Actions:

1. Open
2. View
3. Export to Excel



 Pop-blockers must be disabled in your browser.

Hands-on Lab Exercise 2



1. Filtering the Work Tray
2. Opening and claiming work items

Duration: 10 minutes



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WORK TRAY & CLAIMS TRAINING

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Objective

1. To filter the work tray contents
2. To open and claim work items;

Duration: 10 minutes

Process

1. If you are not on the Work Tray, click the Work Tray tab
2. Click the Fields button and add these filters to the grid by clicking the toggle under Filter; the toggle will turn green; Definition, Last Changed, Workflow State.
Note that the filters have been added to the filter panel.
3. Click the Definition filter, select **Budget Allotment Schedule** from the dropdown list.
Note that the Work Tray has been filtered to show only Budget Allotment Schedule items.
4. Click the Last Changed operator and select **within**. Select **This Month** from the dropdown. Note that the Work Tray has been filtered to show only items changed this month.
5. Click the Workflow State operator and select **not in**. Select **Completed** from the dropdown. Note that the Work Tray has been filtered to show only items that are not at the Completed state.
6. Select a work item and click the Actions button, then select Open from the dropdown. Note that Claimed documents cannot be opened.

User Worktray



User Worktray queries are cloned from an existing query:

1. Clone
2. Set fields and filters
3. Unlock



User Worktray queries are 'cloned' from an existing query.

1. Select the query you want to use as the starting point,
2. Click **Clone** on the queries dropdown,
3. Set the columns and filters as you need,
4. Click **Lock** on the query dropdown

Your custom query is saved with a default name, being the original query name prefixed with 'My ', and suffixed with a number if a query of that name already exists.

- **Clone:** Allows you to clone and save Work Tray configurations for future use, which can be selected from the list later (after selecting the filters click **Clone**).
- **Unlock:** Allows you to modify queries in the User Worktray area (Click on **Unlock**, modify the filters then **Lock**)
 - **Lock:** Allows you to save/lock the user query after modification. (Once the user modifies the filter, click on **Lock** to lock the query)
- **Rename:** Allows you to rename the saved Work Tray configurations (select the configuration from the dropdown and click **Rename**)
- **Delete:** Allows you to delete the saved Work Tray configurations (select the configuration from the dropdown and click **Delete**)
- **Set default:** Allows a user to set either a COMMON or a USER query as the default when the Work Tray is first selected, current default is indicated by dark blue highlight on the right of the query name.

User Worktray



Additional controls are enabled for User Worktray queries:

1. Rename
2. Delete



Two additional controls are enabled in the Queries dropdown once you've created queries in your User Worktray area. These enable you to Rename or Delete your custom queries. Simply select the query and click the control; if you clicked Rename you can overtype the name in the dropdown.

Hands-on Lab Exercise 3



1. Saving a custom User Worktray query

Duration: 5 minutes



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Objective

To create a custom query in the User Worktray area;

Duration: 5 minutes

Process

1. If you are not on the Work Tray, click the Work Tray tab,
2. Select **Claimed by me** from the Query dropdown,
3. Click **Clone** on the Query dropdown. Note that there is now a **My Claimed by me** query in the User Worktray area,
4. Add some fields and filters to the grid,
5. Click **Lock** on the Query dropdown,
6. Test that the query saved by selecting a different query and returning to **My Claimed by me**.
7. Give the query a friendlier name by clicking the **Rename** button from the Query dropdown.

Agenda



Introduction



Configuring the
Work Tray



Transfer/Cancel



Tiles



Q&A

Transfer/Cancel



The Fields dropdown provides three display options:

- **View**
 - The default view of the work items
- **Transfer**
 - Allows the user to transfer their claimed documents as claimed to another user or, if an admin, other users' documents
- **Cancel**
 - Allows the user to cancel their claims or, if an admin, other users' claims

Document	Column	Filter	Display
Claimed By	✓	○	✗
Definition	○	✗	✗
Last Changed	✓	○	✗
Submission Path	✓	○	✗
Latest	○	✗	✗
Work Item Code	✓	○	✗
Work Item Name	○	○	✗
Workflow State	✓	○	✗
Workflow Step	✓	○	✗
Comments	○	✗	✗
Submitter	○	✗	✗

The Fields dropdown allows you to choose from one of three display options:

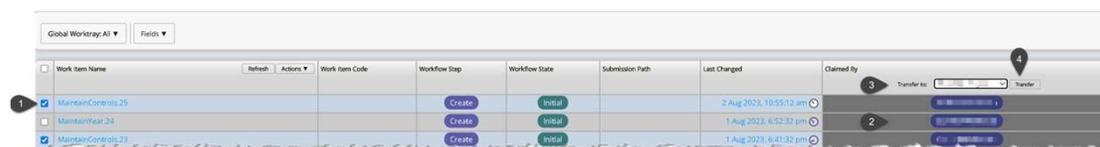
- **View**: this is the default view of the work items, filtered based on the query you have selected,
- **Transfer**; this allows you to transfer your claimed documents to another user who will then have the claim on those items. If you have an Administrator role you can transfer claimed documents on behalf of other users.
- **Cancel**: this allows you to cancel your claim on the selected documents to enable other users to claim them. If you have an Administrator role you can cancel claimed documents on behalf of other users.

These options are available from the Display dropdown, under the Fields dropdown on the Work Tray.

Transfer



1. Select one or more work items
2. The user who has the documents claimed is listed in the Claimed By column
3. Select the user you want to transfer the work items to
4. Click Transfer



Having selected the Transfer display option, follow these steps to effect the transfer of claimed work items to another user:

1. Select one or more items from the Work Tray
2. The user who has the documents claimed is displayed in the Claimed By column. You should confirm that the selected documents are claimed by the user whose claim you want to transfer
3. Select the user who will received the claim on the selected items
4. Click **Transfer** to effect the transfer of the claim.

User who have an Administrator role can transfer documents claimed by other users, otherwise, you can only transfer documents that you have claimed.

Cancel



1. Select one or more work items
2. The user who has the documents claimed is listed in the Claimed By column
3. Click Cancel



Work Item Name	Work Item Code	Workflow Step	Workflow State	Submission Path	Last Changed	Claimed By
<input checked="" type="checkbox"/> MaintainControls.25		Create	Initial		2 Aug 2023, 10:55:12 am	Cancel claim Cancel
<input checked="" type="checkbox"/> MaintainKear.24		Create	Initial		1 Aug 2023, 6:52:52 pm	Cancel claim Cancel
<input checked="" type="checkbox"/> MaintainControls.23		Create	Initial		1 Aug 2023, 6:41:32 pm	Cancel claim Cancel



Having selected the Cancel display option, follow these steps to cancel the claim on the selected items:

1. Select one or more items from the Work Tray
2. The user who has the documents claimed is displayed in the Claimed By column. You should confirm that the selected documents are claimed by the user whose claim you want to cancel
3. Click **Cancel** to effect the cancellation of the claim.

User who have an Administrator role can cancel the claim on documents claimed by other users, otherwise, you can only cancel the claim on documents that you have claimed.

Agenda



Introduction



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Transfer/Cancel



Tiles

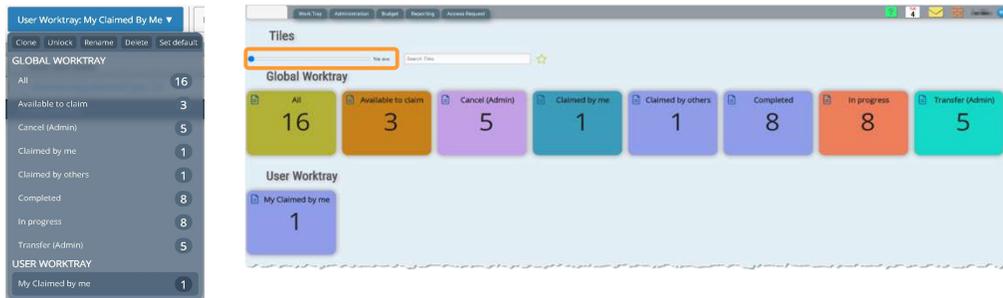


Q&A

Tiles



Tiles presents a summarized view of the Work Tray contents.



Tiles presents a summarized view of the Work Tray contents, which can be helpful if you have a lot of User Worktray queries.

You can increase the tile size using the slider control.

Search Tiles



Search for specific Tiles by entering text into the Search Tiles box.

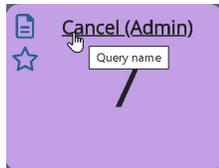


You can search for specific Tiles by typing in the Search Tiles text box; all Tiles that contain the text entered will be displayed.

Tile Controls



View Work Items



Set Favorites



Click the Query name on the Tile to see the list of work items.

You can specify Tiles as Favorites by clicking the Toggle Favorite icon on the Tile. If you only want to see your Favorites, click the Toggle Favorites icon.

Hands-on Lab Exercise 4



1. Tiles

Duration: 5 minutes



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Objective

1. To become familiar with Tiles.

Duration: 5 minutes

Process

1. Click the **Tiles** icon,
2. Use the **Tile size** control to change the size of the Tiles,
3. Set a Tile as a Favorite,
4. Use the Toggle Favorites icon to show only the Tiles you've set as favorites,
5. Click on a **Tile name** to view the list of work items.

Agenda



Introduction



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Transfer/Cancel



Tiles



Q&A



Thank you for undertaking the lesson:
Using the Work Tray

Please complete the survey:



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